

VISITOR '87

A TRAVEL SURVEY OF VISITORS
TO BRITISH COLUMBIA

SOUTHWESTERN BRITISH COLUMBIA TOURISM REGION

ECONOMIC & REGIONAL DEVELOPMENT AGREEMENT

Canada



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SOUTHWESTERN BRITISH COLUMBIA TOURISM REGION

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The responsibility for the content of this report is the consultant's alone, and the conclusions reached herein, do not necessarily reflect the opinions of those who assisted during the course of this investigation or the federal and provincial governments which funded the study.



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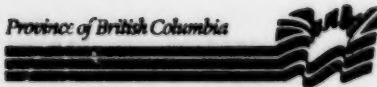
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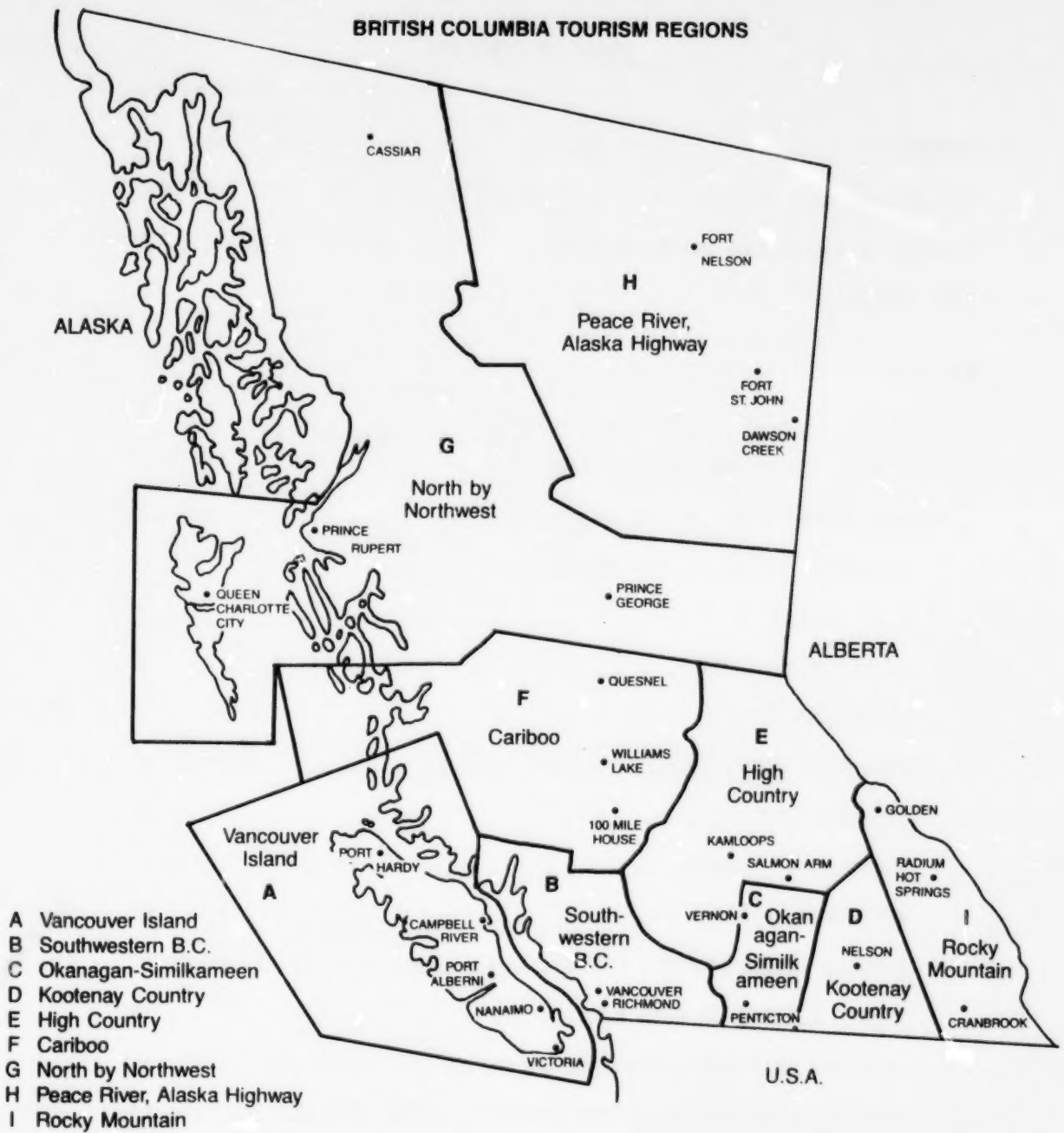


Ministry of Tourism and Provincial Secretary

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BRITISH COLUMBIA TOURISM REGIONS



INTRODUCTION

Visitors '87 is a survey of out-of-province visitors to British Columbia conducted during the period of July to October, 1987. It was undertaken to provide a measure of the numbers of people visiting the province during the summer and fall travel period, and to describe the characteristics and profiles of these visitors. It is the first province wide survey of tourists to British Columbia since 1979.

Visitors '87 involved the surveying of travellers arriving in B.C. at major highways, airports and marine terminals. The survey involved "screening" interviews with representatives of 13,743 travel parties entering B.C., or about 1% of total visitor traffic during the survey period. These parties were comprised of 2,940 excursionists (same-day travellers) and 10,803 tourists (one-or-more night travellers) or visitor parties.

Trip diaries were given to 3 out of 4 visitor parties and these travellers were asked to complete the diary on a daily basis and mail it to Survey Headquarters on the completion of their trip. Response rates of 40% were achieved resulting in 3,225 completed diaries representing over 20,000 party-nights spent in British Columbia. One out of four overnighiting visitors were asked for their name and phone number, and a detailed follow-up interview was conducted by telephone (for North American visitors) and in airport departure lounges (for overseas visitors). A total of 1,005 of these interviews were completed.

The results of the personal interviews, telephone interviews and diary questionnaires were analysed and the results published in a provincial report entitled Visitors '87. To provide additional details at the regional level, nine separate reports were prepared - one for each tourist region - of which this is one.

HOW TO USE THIS REPORT

This report contains a summary of the most often asked questions about non-resident travel to the region. The tables have been set up to provide a variety of information in a concise, tabular format. In all cases, the formats are similar, with a breakdown of responses into three origin categories, a regional total, and a B.C. total.

The three origin categories of Canada, U.S.A. and International provide a comparison among the residents of these areas, which is intended to guide marketing programs. The regional figures and the B.C. figures allow convenient comparisons between the status of the region and the provincial average.

In all cases percentages have been reported. These percentages are intended to add vertically to 100% (in the case of non-multiple responses). In other words, the distribution of responses in each column can be compared to the percentages in the other columns. For example, the number of nights spent in the region by Canadians can be compared to the number of nights spent by Americans or by residents from offshore countries.

To keep the charts uncongested, the actual counts have not been tabulated. However, the counts (representing the number of parties) can be calculated using the figures provided in this report. The following chart tabulates the number of parties visiting each region from each of the three origin categories. Multiplying the appropriate figure from this chart by any percentage in the same origin category will provide a measure of the actual number of visitor parties.

The reader is cautioned that this chart can be used with all exhibits except those recording accommodation and activities. These are measured in party-nights and the appropriate total counts are tallied as Total Party-Nights (in hundreds).

FACTORS TO CALCULATE
ACTUAL NUMBERS OF TRAVEL PARTIES
FROM PERCENTAGES

(During July-October, 1987)

<u>REGION</u>	<u>CANADA</u>	<u>USA</u>	<u>INT'L</u>	<u>REGION</u>
Vancouver Island	106,000	330,000	48,000	484,000
S.W. B.C.	247,000	407,000	128,000	782,000
Okanagan	116,000	81,000	30,000	227,000
Kootenay Country	37,000	24,000	4,000	65,000
B.C. Rockies	145,000	122,000	23,000	290,000
High Country	111,000	127,000	45,000	283,000
Cariboo	7,000	40,000	10,000	55,000
North by Northwest	16,000	59,000	14,000	89,000
Peace River	9,000	35,000	4,000	48,000
B.C. Total	524,000	855,000	156,000	1,355,000

Visitors '87 has generated a vast amount of information about travel to British Columbia and travel within the region. To assist in the task of analysing the results on a regional basis, a series of the key results have been presented.

The following pages contain: a summary explanation of the regional results; a series of twelve tables describing various features about travel to the region; breakdowns of origins into categories of Canada, U.S.A. and International visitors; a comparison to 1979 results; and a summary of what visitors enjoyed most about the region.

In all the tables, the column percentage is quoted to the nearest whole number. The reader is advised to be cautious in interpreting an undue amount of precision in the numbers as statistical reliability varies for each entry in each table. Regional totals are considered accurate to within 3% to 5%, while individual elements in the exhibits have an error factor in the 5% to 20% range.

The reader is also cautioned to recognize the following points when using the report:

- The units of measurement represent number of parties, unless party-nights are specified;
- The survey was conducted solely of non-B.C. residents, as they entered the province between June 21 and October 31, 1987. This 4+ month period represents approximately 52% of total visitor traffic to B.C.;
- Travel by B.C. residents is not included in this survey. Domestic travel is estimated to represent about 45% of total B.C. tourism;
- Consequently, the survey represents between 25% and 30% of B.C. tourism.

For further information regarding the methodology and results of Visitors '87, please contact:

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HIGHLIGHTS

NON-RESIDENT TOURISM IN SOUTHWESTERN BRITISH COLUMBIA

In 1987, there were about 3,057,000 party-nights spent by non B.C. residents in the Southwestern British Columbia region during the period from late June to the end of October. The Southwestern B.C. region represents approximately 40% of the provincial visitor party-nights total.

The total number of parties visiting Southwestern B.C. during the survey period was 782,000 with an average length of stay of 3.9 nights.

Americans made up over half the market share at 52%, followed by Canadians at 32% and International visitors at 16%.

The private automobile was the preferred mode of travel for 37% of visitors touring Southwestern B.C. This was followed by a high percentage of rental cars (30%) and ferry use (23%).

Fifty-six percent of visitors claimed touring was the main purpose of their trip. Visiting friends and relatives was the main reason for travelling to the region for four out of ten visitors.

The average party-size of travellers to Southwestern B.C. was 2.5, while the most common party was comprised of two adults.

Two-thirds of visitors to Southwestern B.C. had been to B.C. on a previous trip.

The majority of people visiting Southwestern B.C. (68%) did not attend Expo 86.

Staying with friends and relatives was the preferred accommodation for 35% of visitors to the region. Next in order of popularity were hotels (29%) and motels (17%).

The top three activities pursued by visitors in order of importance were sightseeing (51%), shopping (41%) and visiting friends and relatives (32%).

Visitors to Southwestern B.C. spent an average of \$157 per party and \$62 per person per day. The single largest expenditure was accommodation at \$46 daily, followed by restaurants at \$35.

Total non-resident tourist revenue generated in the Southwestern B.C. region during the July to October period was \$428 million. This represents about 48% of the total out-of-province visitor expenditure in the province during the summer-fall period.

NUMBER OF NIGHTS SPENT IN SOUTHWESTERN B.C.
TOURIST REGION

<u>NIGHTS</u>	<u>CANADA</u>	<u>U.S.A.</u>	<u>INT'L</u>	<u>REGIONAL TOTAL</u>	<u>B.C. TOTAL</u>
1	2%	7%	1%	4%	11%
2	7	17	10	13	16
3	12	23	13	18	19
4	11	16	11	13	12
5-7	26	22	17	22	19
8-10	19	9	13	13	10
11-15	23	7	33	17	11
16-20	-	-	2	-	-
20 and over	-	-	-	-	-
Row Percentage	32%	52%	16%	100%	100%

- o The regional average length of stay for all visitors to Southwestern B.C. was 3.9 nights.
- o American visitors comprised just over half (52%) of total party nights.
- o Canadian visitors were more likely to stay in the region longer than Americans (with 42% staying longer than a week). However, the longest visits were likely to be made by International visitors with 35% of people for overseas staying eleven days or more compared to 7% of Americans and 23% of Canadians.

IS B.C. THE MAJOR DESTINATION
OF VISITORS TO SOUTHWESTERN B.C.?

<u>RESPONSE</u>	<u>CANADA</u>	<u>U.S.A.</u>	<u>INT'L</u>	<u>REGIONAL TOTAL</u>	<u>B.C. TOTAL</u>
No	22%	41%	58%	38%	38%
Yes	<u>78</u>	<u>59</u>	<u>42</u>	<u>62</u>	<u>62</u>
Row Percentage	32%	52%	16%	100%	100%

- o B.C. was the major destination for just under two-thirds (62%) of travellers to Southwestern B.C. and to B.C.
- o B.C. was much more likely to be the main destination for Canadians (78%) than Americans (59%) or International visitors (42%).

METHOD OF TRAVEL TO B.C.
OF VISITORS TO SOUTHWESTERN B.C.

<u>MODE OF TRANSPORT</u>	<u>CANADA</u>	<u>U.S.A.</u>	<u>INT'L</u>	<u>REGIONAL TOTAL</u>	<u>B.C. TOTAL</u>
Own Automobile	32%	46%	7%	35%	48%
Rented Automobile	2	12	19	10	8
R.V.	7	12	2	9	14
Bus	2	4	9	4	3
Plane	61	26	73	45	30
Train	1	1	2	1	1
Cruise	1	8	2	5	4
Ferry	3	12	6	8	11
Other	<u>-</u>	<u>1</u>	<u>1</u>	<u>1</u>	<u>1</u>
Row Percentage	32%	52%	16%	118%	100%

- o More people arrived in Southwestern B.C. by airplane (45%) than any other mode of transportation. Close to three-quarters (73%) of International visitors and just under two-thirds of Canadians (61%) arrived by plane.
- o The second most important mode of transportation overall and the major mode of transportation for American visitors was private automobile. Thirty-five percent of all visitors to Southwestern B.C. and close to half (46%) of American visitors arrived by car.
- o There was a much higher use of rented cars by International visitors (19%) than Americans (12%) or Canadians (2%).

METHOD OF TRAVEL IN B.C.
OF VISITORS IN SOUTHWESTERN B.C.

<u>MODE OF TRANSPORT</u>	<u>CANADA</u>	<u>U.S.A.</u>	<u>INT'L</u>	<u>REGIONAL TOTAL</u>	<u>B.C. TOTAL</u>
Own Automobile	39%	45%	10%	37%	50%
Rented Automobile	32	25	43	30	20
R.V.	8	13	6	10	15
Bus	14	14	31	16	11
Plane	5	2	5	3	3
Train	3	4	10	4	3
Cruise	3	6	4	5	3
Ferry	27	21	25	23	17
Other	<u>25</u>	<u>10</u>	<u>24</u>	<u>17</u>	<u>13</u>
Row Percentage	32%	51%	16%	145%	133%

- o The most popular mode of transportation for travel through Southwestern B.C. was the private automobile (37%). This was followed closely by rental cars (30%).
- o Close to one-third (31%) of International visitors travelled by bus. This compared to 14% for Canada and the U.S. respectively.
- o International visitors were approximately three times as likely to travel through the region by train (10%) than Canadians (3%) or Americans (4%).
- o Approximately one in four total visitors used ferries as a means of transportation.

**MAIN PURPOSE OF TRIP OF
VISITORS TO SOUTHWESTERN B.C.**

<u>MAIN TRIP PURPOSE</u>	<u>CANADA</u>	<u>U.S.A.</u>	<u>INT'L</u>	<u>REGIONAL TOTAL</u>	<u>B.C. TOTAL</u>
Business	27%	8%	7%	14%	10%
Conference	10	7	6	7	5
Visit Friends/Relatives	65	24	45	41	38
Touring Trip	38	63	71	56	56
City Trip	10	19	14	15	11
Personal	8	4	5	6	6
Outdoors Trip	11	20	13	16	20
Wilderness/Adventure	3	10	15	9	10
Resort	9	12	11	11	14
Cruise	5	15	3	9	7
Theme Park	3	6	4	5	6
Special Event	<u>6</u>	<u>4</u>	<u>3</u>	<u>5</u>	<u>5</u>
Row Percentage	32%	52%	16%	194%	187%

- o For the majority of people visiting Southwestern B.C. (56%) the main purpose of their trip was touring. Approximately seven out of ten International visitors and six out of ten American visitors were touring.
- o Visiting friends and relatives was cited as the second main reason (41%) for travelling the region. Canadians cited visiting friends and relatives as the main purpose for their trip approximately two-thirds of the time (65%).
- o Approximately one in four Canadians (27%) travelled to the region on business.
- o Close to 15% of American visitors were on a cruise.
- o Outdoors, wilderness/adventure and resort trips were also significant. Together, they are cited as the main purpose of trip by 39% of International visitors and 42% of American visitors.

**PARTY COMPOSITION OF
VISITORS TO SOUTHWESTERN B.C.**

<u>PARTY COMPOSITION</u>	<u>CANADA</u>	<u>U.S.A.</u>	<u>INT'L</u>	<u>REGIONAL TOTAL</u>	<u>B.C. TOTAL</u>
1 Adult	32%	11%	20%	19%	14%
2 Adults	44	57	48	51	52
3 Adults	4	6	7	5	5
4 or More Adults	6	10	14	9	10
Adult(s) and 1-2 Ch.	13	14	10	13	15
Adult(s) and 3+ Ch.	<u>2</u>	<u>2</u>	<u>1</u>	<u>2</u>	<u>3</u>
Row Percentage	31%	52%	17%	100%	100%
Average (persons)	2.3	2.7	2.6	2.5	2.64

- o Over half of all parties (51%) visiting Southwestern B.C. were comprised of two adults.
- o Almost one in five visitors were travelling on their own.
- o A comparatively small percentage of parties were travelling with children (15%).
- o Overseas visitors and Americans were more likely than Canadians to travel in groups of three or more.
- o Average party size of visitors to the area was 2.5.

**FIRST VISIT TO B.C. BY
VISITORS TO SOUTHWESTERN B.C.**

<u>RESPONSE</u>	<u>CANADA</u>	<u>U.S.A.</u>	<u>INT'L</u>	<u>REGIONAL TOTAL</u>	<u>B.C. TOTAL</u>
No	86%	63%	36%	66%	73%
Yes	<u>14</u>	<u>37</u>	<u>64</u>	<u>34</u>	<u>27</u>
Row Percentage	32%	52%	16%	100%	100%

- o Just over one-third of all visitors to Southwestern B.C. (34%) were making their first trip to B.C.
- o First time visitors were most common among International visitors (64%) followed by Americans (37%).

**NUMBER OF TRIPS TO B.C. IN THE PAST
THREE YEARS BY VISITORS TO SOUTHWESTERN B.C.**

<u>NO. OF TRIPS</u>	<u>CANADA</u>	<u>U.S.A.</u>	<u>INT'L</u>	<u>REGIONAL TOTAL</u>	<u>B.C. TOTAL</u>
None	15%	26%	41%	24%	19%
1	12	18	27	16	15
2	19	20	18	19	21
3	18	14	6	15	15
4-5	11	8	2	9	11
6 or more	<u>25</u>	<u>13</u>	<u>7</u>	<u>17</u>	<u>19</u>
Row Percentage	41%	49%	10%	100%	100%
Average (trips)	4.3	2.9	1.5	3.4	3.71

- o Almost one in four visitors (24%) had not made a trip to B.C. in the last three years.
- o Canadians appeared to make frequent trips to B.C. with one in four claiming to have visited B.C. more than six times. This compared to 17% of all visitors.

**VISITED EXPO 86 BY VISITORS
TO SOUTHWESTERN B.C.**

<u>RESPONSE</u>	<u>CANADA</u>	<u>U.S.A.</u>	<u>INT'L</u>	<u>REGIONAL TOTAL</u>	<u>B.C. TOTAL</u>
No	58%	71%	87%	68%	68%
Yes	<u>42</u>	<u>29</u>	<u>11</u>	<u>32</u>	<u>32</u>
Row Percentage	38%	50%	12%	100%	100%

- o Just over two-thirds of visitors to Southwestern B.C. (68%) did not attend Expo 86.
- o Canadians were most likely to have visited Expo (42%) followed by Americans (29%).

**ACCOMMODATION USED BY VISITORS
TO SOUTHWESTERN B.C.**

<u>ACCOMMODATION</u>	<u>CANADA</u>	<u>U.S.A.</u>	<u>INT'L</u>	<u>REGIONAL TOTAL</u>	<u>B.C. TOTAL</u>
Hotel	29%	30%	29%	29%	16%
Motel	12	25	11	17	24
Campground	7	16	10	11	24
Friends/Relatives	49	19	40	35	26
Resort/Lodge	1	3	-	1	4
Cottage/B & B	1	1	2	1	2
Other	<u>2</u>	<u>7</u>	<u>9</u>	<u>5</u>	<u>4</u>
Row Percentage	41%	38%	21%	100%	100%
Total Party-Nights x (100)	9329	8716	4752	22797	57119

- o The most popular accommodation used by visitors was the homes of friends and relatives (35%) followed by hotels (29%) and then motels (17%).
- o Almost one in two Canadians (49%) visiting the region stayed with friends or relatives.
- o Americans were more likely to stay in motels (25%) and camp (16%) than Canadians or International visitors.

**ACTIVITIES PURSUED BY VISITORS
TO SOUTHWESTERN B.C.**

<u>ACTIVITIES</u>	<u>CANADA</u>	<u>U.S.A.</u>	<u>INT'L</u>	<u>REGIONAL TOTAL</u>	<u>B.C. TOTAL</u>
Shopping	37%	44%	43%	41%	37%
Tour	9	13	15	12	11
Sightseeing	37	60	58	51	50
Passing Through	13	13	15	13	22
Business	23	11	7	15	8
Outdoor Activities	18	27	21	22	28
Sporting Activities	7	9	7	8	11
Nightlife	15	10	11	12	9
Other Activities	5	4	5	4	4
Beach/Lakeshore	20	24	29	23	27
Museum/Gallery	5	13	10	9	11
Historic Site	7	19	14	13	14
Amusement Park/Fair	4	5	6	5	4
Gardens/Parks	21	36	36	30	25
Friends/Relatives	49	19	22	32	26
Other	3	3	3	3	3
Sporting Event	2	2	2	2	2
Festival	3	3	3	3	3
Cultural Performance	3	3	4	3	3
Other Event	<u>1</u>	<u>2</u>	<u>2</u>	<u>2</u>	<u>1</u>
Row Percentage	40%	38%	21%	304%	298%
Total Party-Nights x (100)	9144	8670	4841	22654	56715

- o The most popular activities for visitors to Southwestern B.C. were sightseeing (51%), shopping (41%) and visiting friends and relatives (32%).
- o Canadians were most likely to spend time visiting friends (49%), while Americans and International visitors were more likely to spend time sightseeing - 60% and 58% respectively.
- o Visiting the beach or lakeshore was important for approximately one in four visitors.
- o Less popular activities for visitors included attending sporting events, festivals or cultural performances.

**AVERAGE EXPENDITURES OF VISITORS
TO SOUTHWESTERN B.C.**

(PER PARTY PER DAY)

<u>CATEGORY</u>	<u>CANADA</u>	<u>U.S.A.</u>	<u>INT'L</u>	<u>REGIONAL TOTAL</u>	<u>B.C. TOTAL</u>
Accommodation	\$42.22	\$52.40	\$43.33	\$46.14	\$37.28
Auto Transportation	15.25	13.42	10.23	13.48	15.19
Other Transportation	6.50	6.10	7.41	6.47	6.48
Package/Cruise	4.32	15.67	9.84	9.87	10.19
Restaurants	36.71	34.67	30.95	34.53	26.75
Groceries	9.12	6.77	9.31	8.21	7.89
Recreation/ Entertainment	4.38	6.90	5.60	5.57	5.26
Shopping/Souvenirs	24.15	24.06	42.59	27.78	18.88
Other	<u>5.99</u>	<u>3.86</u>	<u>11.30</u>	<u>6.19</u>	<u>4.87</u>
Total Expenditure per party per day*	\$148.46	\$162.00	\$169.19	\$157.22	\$131.88
Party Size	2.3	2.7	2.6	2.5	2.64
Total Expenditure per person per day*	\$64.55	\$60.00	\$65.07	\$62.14	\$49.95

- o The average per party expenditure of people to Southwestern B.C. was \$157, while the average per person expenditure was \$62.
- o International visitors spent the most both per party (\$169) and per person (\$65).
- o For all visitors accommodation is the single largest expense (\$46) followed by restaurants (\$35) and then shopping (\$28).

* Totals may not add due to rounding of individual expenditure items and due to analytical techniques based on questionnaire responses recorded to the nearest dollar.

"BEST" ASPECTS OF EACH REGION

RESPONSE	SOUTHWEST B.C.	VANCOUVER ISLAND	OKANAGAN SMILKAMEEN	KOOTENAY COUNTRY	B.C. ROCKIES	HIGH COUNTRY	CARIBOO	NORTH BY N.W.	PEACE RIVER - ALASKA	B.C. TOTAL
Scenery	49%	51%	38%	65%	51%	52%	58%	54%	49%	46%
Mountains	9	6	7	6	16	7	-	15	6	9
Lakes	13	15	19	14	14	14	11	5	8	13
Gardens	9	10	3	2	1	9	-	15	6	5
Fruits	5	6	14	7	-	3	-	-	-	4
Parks	5	8	3	6	11	4	-	4	-	4
Clean	1	1	5	-	2	1	-	10	1	3
Weather	21	28	49	38	30	19	4	7	20	24
Family	13	7	25	43	8	10	4	5	14	15
Friendly	21	23	17	9	24	21	20	33	26	20
Recreation	9	10	22	5	21	5	25	2	12	13
Food	9	9	9	7	7	7	11	16	6	9
Accommodation	9	4	6	9	7	9	-	21	8	8
Shopping	2	3	-	1	5	1	-	21	-	3
Campgrounds	4	4	8	-	15	7	15	4	12	9
Wilderness	3	4	-	-	7	6	11	-	6	4
Outdoors	11	12	5	19	26	9	15	16	-	10
Relaxing	9	8	6	6	5	6	10	3	11	6
Gen. Pretty	12	7	7	6	4	5	8	21	9	6
Gen. Touring	4%	2%	9%	-	4%	2%	11%	9%	-	4%

- o Mentioned most often as the "best" aspects of Southwestern B.C. were the scenery (49%), the weather (21%), friendly people (21%) and the lakes (13%).
- o The "best" aspects of British Columbia were generally the same categories, but their overall significance was lower.
- o Ranking lower in the opinions of visitors to Southwestern B.C. than the overall perception of the province were cleanliness, weather, family oriented, recreation and campgrounds.

INTEREST IN VISITING REGIONS BY SEASON

<u>REGION</u>	<u>SEASON</u>			
	<u>SPRING</u>	<u>SUMMER</u>	<u>FALL</u>	<u>WINTER</u>
Southwestern B.C.	34%	68%	36%	22%
Vancouver Island	39	67	35	23
Okanagan Similkameen	24	82	25	19
Kootenay Country	12	85	3	24
B.C. Rockies	28	83	16	24
High Country	30	79	23	16
Cariboo	12	100	50	18
North by N.W.	15	74	35	9
Peace River-Alaska	<u>55</u>	<u>73</u>	<u>39</u>	<u>23</u>
Total	34%	74%	33%	20%

- o Southwestern B.C. was perceived as an appropriate location to visit in the spring by one-third of summer visitors.
- o Two-thirds of existing visitors would be interested in visiting in the summer and one-third in the fall.
- o Winter was seen as a season to visit the Island by 22% of summer visitors.

**COMPARISON OF VISITORS TO
SOUTHWESTERN B.C. BETWEEN 1979 AND 1987**

<u>ORIGIN</u>	<u>1979</u>		<u>1987</u>	
	<u>S.W. B.C.</u>	<u>B.C.</u>	<u>S.W. B.C.</u>	<u>B.C.</u>
Alberta	19%	33%	11%	19%
Saskatchewan	4	5	4	3
Manitoba	3	2	2	2
Ontario	8	6	11	7
Quebec	2	1	2	2
Other Canada	1	1	2	1
Total Canada	<u>37</u>	<u>48</u>	<u>32</u>	<u>34</u>
Washington	20	18	11	14
Oregon	6	5	5	6
California	15	11	14	13
Other West. U.S.	5	6	9	12
Other U.S.	8	7	14	12
Total U.S.	<u>54</u>	<u>47</u>	<u>53</u>	<u>57</u>
Europe	6	4	11	7
Asia	2	1	1	1
Australia/N.Z.	2	1	3	2
Other World	1	-	1	1
Total International	<u>11%</u>	<u>6%</u>	<u>16%</u>	<u>11%</u>

- o The largest relative increase in visitors to Southwestern B.C. was in International visitors increasing from 11% to 16%.
- o The close-in American markets decreased in size, while the more distant U.S. markets increased significantly from 13% to 23%.
- o Alberta declined from 19% in 1979 to 11% in 1987, while Ontario increased from 8% to 11%.